Tagged File Attachments

Training

 \mathcal{D}

One challenge with sending automated emails in a workflow is when record specific attachments need to be included. In the past, you had to use the "Send Manually with Preview" option to manually attach any documents that needed to be included. Now you can use the "Choose Tag" option in the template attachments screen to select which Tagged files should be auto-attached.

How this works:

Each of the documents listed in the **'Files'** tab of a Contact, Property or Transaction can be tagged with any number of tags which to classify them. Individual tags can be assigned to multiple files to group documents that are related in some way. The 3 documents below have individual tags for **Appraisal**, **Disclosure** and **Contract** as well as the tag of **Closing Package** to group them together.

Pending -	123 S MAIN BOLIN MLS 12345667788 Sale Price \$ 300000 Closing Date Add Closin Time Last saved 27 minutes age	ng Date Time Add	Google	Understeine Reineren Hernen Reineren Hernen Reineren Hernen	e e e e e e e e e e e e e e e e e e e	 ♥ ♥ ♥ ♥ ♥ ♥
Radar Transaction	Property People	Commission	Buyer Reports	Files	Calendar	Activities
↓ Ada ↓	Drag and raisal on 123 S Main Street description 18.2018 @ 04:48 PM losing Package, Appraisal ers Disclosure on 123 S Mai description 18.2018 @ 04:46 PM losing Package, Disclosure tract on 123 S Main Bolivar description 18,2018 @ 04:33 PM losing Package, Contract	ain Street Bolivar.pdi	Each assig Use whic	gned the t h file -atta	can be multip ags to s es shou ched to s.	le tags. specify Id be

To attach all documents from the files tab that is tagged with '**Closing Package**' you simply click on the '**Attachments'** icon in the toolbar of a template.

Title*	Closing Information	Tags	Assign a new tag	*
Jse with*	Transaction 👻	Via*	Email-Transactional	- 0
Subject*	Closing Scheduled for [[Transaction#StreetAddress	0		
* 6			≣ ≝ B <i>I</i> <u>U</u> S <u>A</u> - ⊠-	1
Styles		Line Hei		

Select the '**Choose Tags**' tab and select the tag(s) that you want auto-attached then press the [**OK**] button. In this case we want all documents in the files tab that are tagged with '**Closing Package**'. *Note*: You can select multiple tags to attach different types of documents if needed.

	erties			×
Upload File	Choose File	Choose Tags		
* Closing Packag	e			
		ng(s) that ar	e	
ass	igned to	the files		
ass	igned to			
ass	igned to	the files		
ass	igned to	the files		
ass	igned to	the files		
ass	igned to	the files		

Special Note: If your attachment screen does not have the '**Choose Tags**' tab you will need to convert it to an enhanced template using the convert icon located next to the template name in the template list. (see: converting to enhanced templates)

Com. DES IST LETTER HEIT D	5	
CSW: BES-2ND CHECKLIST	t, 🗅 🕲	Track email res
CSW: BES-INTRODUCE TEAM	Convert	to Enhanced Template

The selected list of tags used to auto-attach documents to the template will be displayed at the bottom of the Template Editor screen.

Title*	Closing Information	Tags	Assign a new tag	
Jse with*	Transaction		Email-Transactional	Ŧ
Subject*	Closing Scheduled for [[Transaction	#StreetAddress]]		
Styles	☐ ☐ ☐ ↓ ← → → ¶ ¶ ↓ ↓ ☐ ↓ ← → ↓ Format → ↓ Format → ↓ Font → ↓ ↓ ⊕ Source ↓	:::::::::::::::::::::::::::::::::::::		
		saction:BuyersTitle#WorkAddress		
 You Re As soon as **If you har receive din amounts. A closing. Let us know 	ase remember that [[Transaction#SignAtCk u will need to bring the following • A valid government-issued photo I.D • Personal checkbook - for just in case • Your routing number and account nu wiring number different from what is yo member to have utilities set up to be taken of the Title Company is able to put together the ve a mortgage to be paid off, the payoff and octly from your bank. The time it takes to put hy differences and any money left in your of w if you have any questions at this time. ou will find the closing documents for review	ose]] will need to be at the closing (driver's license, passport). purposes. umber so that title can wire you ur on your checks such as with B out of your name on [[Transaction he HUD Settlement Statement, w ount on the HUD Settlement State ocess an official statement for the secrow account will be refunded of	<pre># to sign. # roceeds to you directly. If you hat ank of America, please have that read #PossessionDate]] e will get that to you for your review. ement may not match the payoff amou title company creates a slight discrep</pre>	ly as well. Int you bancy in
 You Re As soon as **If you har receive dira amounts. A closing. Let us know 	 a will need to bring the following A valid government-issued photo I.D. Personal checkbook - for 'just in case Your routing number and account nu wiring number different from what is yo member to have utilities set up to be taken of the Title Company is able to put together the ve a mortgage to be paid off, the payoff anni- ectly from your bank. The time it takes to provide the takes to put your differences and any money left in your of wif you have any questions at this time. 	ose]] will need to be at the closing (driver's license, passport). purposes. umber so that title can wire you ur on your checks such as with B out of your name on [[Transaction he HUD Settlement Statement, w ount on the HUD Settlement State ocess an official statement for the secrow account will be refunded of	<pre># to sign. # roceeds to you directly. If you hat ank of America, please have that read #PossessionDate]] e will get that to you for your review. ement may not match the payoff amou title company creates a slight discrep</pre>	ly as well. Int you bancy in
 You Re As soon as **If you has receive din amounts. A closing. Let us know Attached y 	 a will need to bring the following A valid government-issued photo I.D. Personal checkbook - for 'just in case Your routing number and account nu wiring number different from what is yo member to have utilities set up to be taken of the Title Company is able to put together the ve a mortgage to be paid off, the payoff anni- ectly from your bank. The time it takes to provide the takes to put your differences and any money left in your of wif you have any questions at this time. 	ose]] will need to be at the closing (driver's license, passport). purposes. umber so that title can wire you ur on your checks such as with B out of your name on [[Transaction he HUD Settlement Statement, wo ount on the HUD Settlement State occess an official statement for the escrow account will be refunded of w	r proceeds to you directly. If you ha ank of America, please have that read #PossessionDate]] e will get that to you for your review. ement may not match the payoff amou title company creates a slight discrep lirectly from your mortgage company a	ly as well. Int you vancy in ifter
 You Re As soon as **If you har receive din amounts. / closing. Let us knov Attached y Tags For 	 a will need to bring the following A valid government-issued photo I.D Personal checkbook - for 'just in case Your routing number and account nu wing number different from what is yo member to have utilities set up to be taken of the Title Company is able to put together the velocity from your bank. The time it takes to provide the taken of only differences and any money left in your of wif you have any questions at this time. ou will find the closing documents for review The Files To Be Included In Email:(1) 	ose]] will need to be at the closing (driver's license, passport). purposes. umber so that title can wire you ur on your checks such as with B out of your name on [[Transaction he HUD Settlement Statement, w ount on the HUD Settlement State ocess an official statement for the escrow account will be refunded of w	<pre># to sign. # roceeds to you directly. If you hat ank of America, please have that read #PossessionDate]] e will get that to you for your review. ement may not match the payoff amou title company creates a slight discrep</pre>	y as well. Int you wancy in ifter
• You • Re As soon as ••If you ha receive din amounts. / closing. Let us knov Attached y Tags For Closing P	 a will need to bring the following A valid government-issued photo I.D Personal checkbook - for 'just in case Your routing number and account nu wing number different from what is yo member to have utilities set up to be taken of the Title Company is able to put together the velocity from your bank. The time it takes to provide the taken of only differences and any money left in your of wif you have any questions at this time. ou will find the closing documents for review The Files To Be Included In Email:(1) 	ose]] will need to be at the closing (driver's license, passport). purposes. umber so that title can wire you ur on your checks such as with B out of your name on [[Transaction he HUD Settlement Statement, w ount on the HUD Settlement State ocess an official statement for the escrow account will be refunded of w	to sign. r proceeds to you directly. If you has ank of America, please have that read #PossessionDate]] e will get that to you for your review. ement may not match the payoff amout title company creates a slight discrep lirectly from your mortgage company a which tag(s) are	y as well. Int you wancy in ifter

When the template is used from a workflow or individually from a contact, property or transaction screen the system will check the files tab of the record to locate all documents with the selected tag and automatically attach them to the email before sending. This means that you no longer need to use the "Send Manually with Preview" just to manually attach files, Realvolve can do it automatically for you.

In this case it attached all 3 documents that were tagged as 'Closing Package'.



NOTE: This is a GREAT way to automatically send the HUD1's to everyone that had a transaction with you the previous year.

Add a workflow activity to send the template on January 3rd (the year is ignored) and make sure the document in the files tab of the transaction is tagged as 'HUD1' and use that tag in the template as shown above.

					Reassi	gn User 1 🔿
Title*	Send HUD1 to Buye	r on 3rd of January for		Email	*	Color
Assign To*	Joe Agent	*		🗮 Mediun	n *	\$ 1
With	Pick the interest	ed parties		General	*	Report?
Schedule	When	A.		Reminder		
None			at	Set the	e frequend	су
A specific	c date 🛗 January	03, 2018				
All day			*			
All day	ted date			Create	e Actions	
	ted date	* After	• •	Create ≣• Send Er		¢
A compu	Days	- After		-		C
A compu	Days	✓ After	*	-	nail	Update Cancel

Questions?

Please direct questions and comments to support@realvolve.com © 2018, Realvolve, LLC. All rights reserved.